

# **SITE VISIT CHECKLIST**

## **Purpose and Goal:**

To obtain information required to prepare a final work plan and work plan proposal.

### **1. Conduct pre-site visit conference call**

- a. \_\_\_\_ Contractor, PM (CoE), FM.
- b. \_\_\_\_ Establish schedule, begin planning (dates, duration)
- c. \_\_\_\_ Discuss documents required for site visit.
- d. \_\_\_\_ Forward and review an agenda establishing a duration of the visit.

### **2. Site Visit Kickoff meeting**

- a. \_\_\_\_ Intro, discuss roles and responsibilities
- b. \_\_\_\_ Discuss and clarify the scope
- c. \_\_\_\_ Discuss proposed goals for the visit
  - i. \_\_\_\_ Detailed schedule of visit
  - ii. \_\_\_\_ Tentative renewal schedule
  - iii. \_\_\_\_ Document to be examined or obtained
  - iv. \_\_\_\_ Who is to be interviewed and what is to be discussed

### **3. Topics to discuss**

- a. \_\_\_\_ Special scheduling requirements
- b. \_\_\_\_ Phasing if required

- c. \_\_\_\_Any known code or accreditation issues
- d. \_\_\_\_Classification of work, i.e. scope of k vs. l work.
- e. \_\_\_\_Presence of hazardous materials-known or suspected
- f. \_\_\_\_Mobilization considerations
- g. \_\_\_\_Any other special issues or criteria
- h. \_\_\_\_Equipment issues
- i. \_\_\_\_Coordination with mech, elect, arch
- j. \_\_\_\_Scheduling (procurement)
- k. \_\_\_\_Disruptions (impact on patients)
- l. \_\_\_\_Safety (Interim life-safety)
- m. \_\_\_\_Intensive Management Plan
- n. \_\_\_\_Discussion on 'industry standard' as the level of quality for construction. (DPW, QA)

#### **4. Documentation**

- a. \_\_\_\_PFD/Concept of Operation
- b. \_\_\_\_Test-fit Layout from MP if available
- c. \_\_\_\_Equipment list/plan
- d. \_\_\_\_As-built

- e. \_\_\_\_Maintenance records
- f. \_\_\_\_Installation/Historic/Environmental concerns
- g. \_\_\_\_Hazardous material reports

## **5. Interviews**

- a. \_\_\_\_Facility Manager
- b. \_\_\_\_Maintenance personnel
- c. \_\_\_\_DPW
- e. \_\_\_\_Staff
- f. \_\_\_\_Fire Marshall

## **6. Inspections**

- a. \_\_\_\_Area to be renewed
- b. \_\_\_\_Above ceiling spaces
- c. \_\_\_\_Conditions – keep the 1391 in mind
- d. \_\_\_\_Code compliance issues; ADA, NFPA, etc
- e. \_\_\_\_Mechanical spaces
- f. \_\_\_\_Site condition if applicable
- g. \_\_\_\_Statement of conditions

## **7. Out-brief**

- a.** \_\_\_\_Exit meeting/brief
- b.** \_\_\_\_Summarize finding
- c.** \_\_\_\_Address issues impacted
- d.** \_\_\_\_Layout/scope
- e.** \_\_\_\_Schedule
- f.** \_\_\_\_Phase/disruption plan
- g.** \_\_\_\_Cost
- h.** \_\_\_\_Outstanding issues- additional documents needed, information required etc.